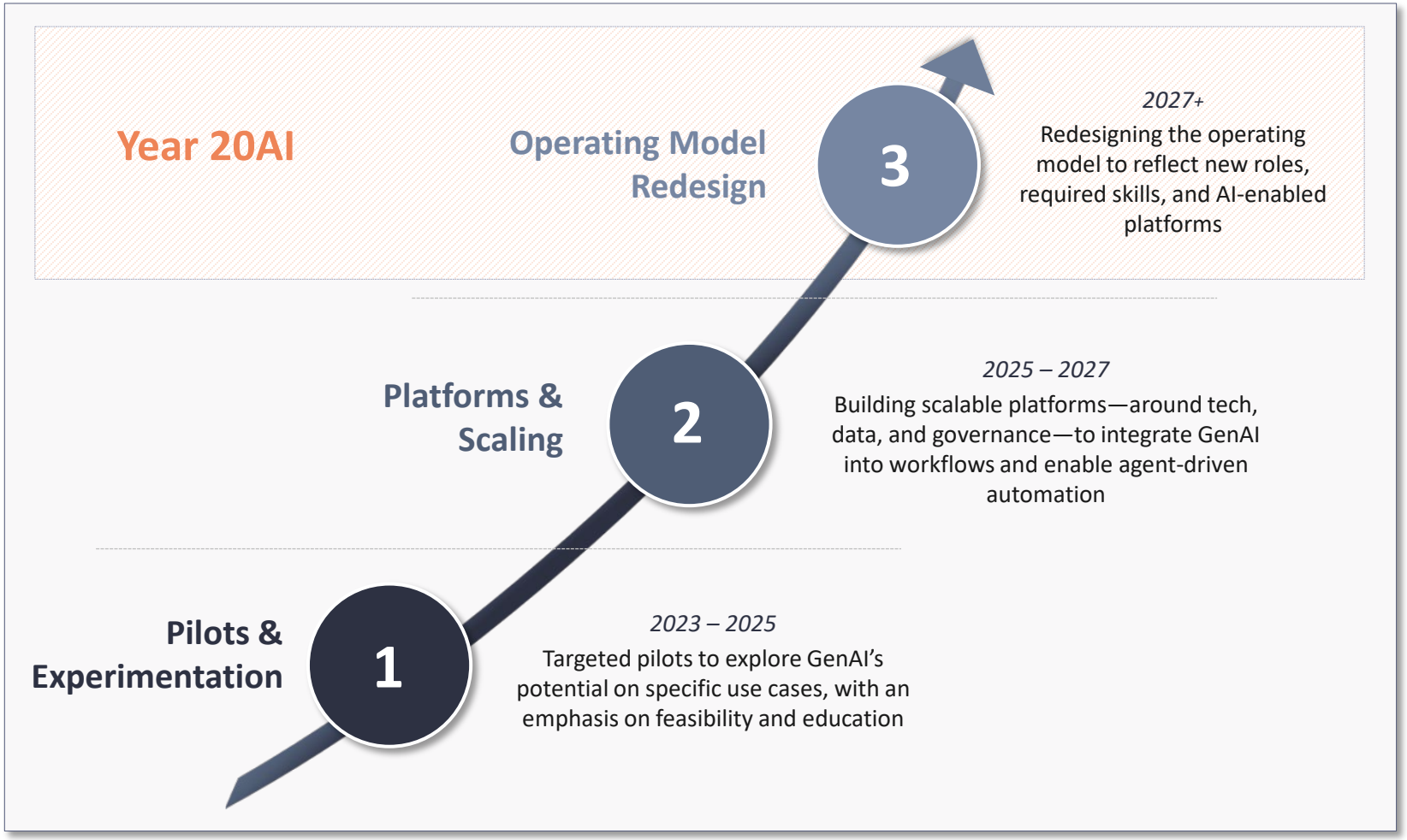
The Asset Management Journey to an AI-enabled Future

A Snapshot of Where We Are Today

The asset management industry is moving through a the GenAI maturity curve. Most firms have progressed beyond early pilots and are now building scalable platforms while beginning to confront the harder work of redesigning workflows and operating models for an AI-enabled future.

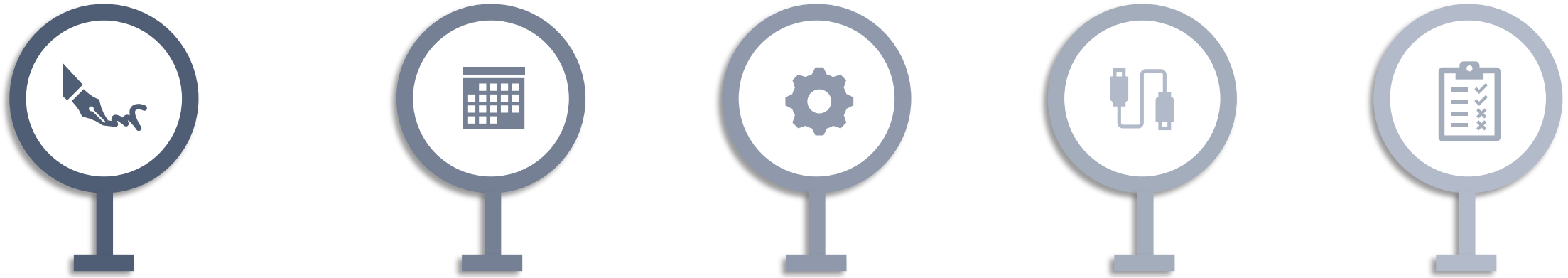
This paper focuses on the third pillar, Year 20AI, and explores how this stage drives a fundamental shift in the operating model.

It goes beyond technology deployment to reimagine how work is organized, how decisions are made, and how value is delivered. Success in this phase requires new roles, flatter hierarchies, embedded governance, and organizations designed for human-AI collaboration at scale.



How we will engage with LLMs

Today



Copilots & Pointed Solutions

On-demand assistant for thinking tasks and real-time content generation.

Personalized Assistants

Highly tailored models with deep knowledge of your specific data, context, and preferences.

Business-led Software Development

Empowering non-technical users to build functional tools and applications using natural language.

Workflow & System Automation

Deeply embedded, "invisible" AI that fully automates end-to-end business processes.

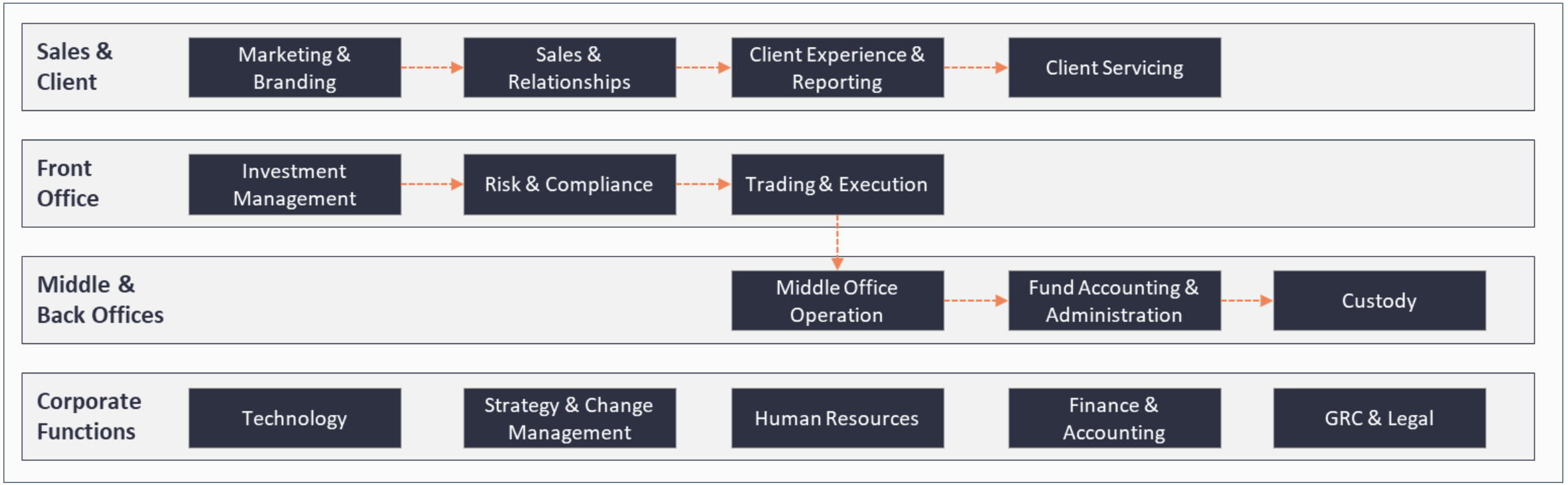
Agent Task Operator

Multi-step task execution where the AI plans and acts on your behalf with minimal supervision.

An Agentic-Enabled Enterprise

Current Operating Model

The current model relies on a highly linear process with multiple dependencies, rather than leveraging intelligence to accelerate value delivery



What Do We Mean by Agentic Operating Model

The future of asset management is not about faster handoffs or smarter automation. It is about dissolving the boundaries that made handoffs necessary in the first place. In an agentic operating model, work no longer moves sequentially through functions. Instead, it flows dynamically across an intelligent network of humans and AI agents, coordinated through embedded context and real-time orchestration. The shift is from process execution to outcome orchestration.

In this model, intelligence is not accessed through tools or dashboards. It is woven directly into the flow of work. AI agents are embedded within workflows, continuously sensing context, anticipating needs, and taking action.

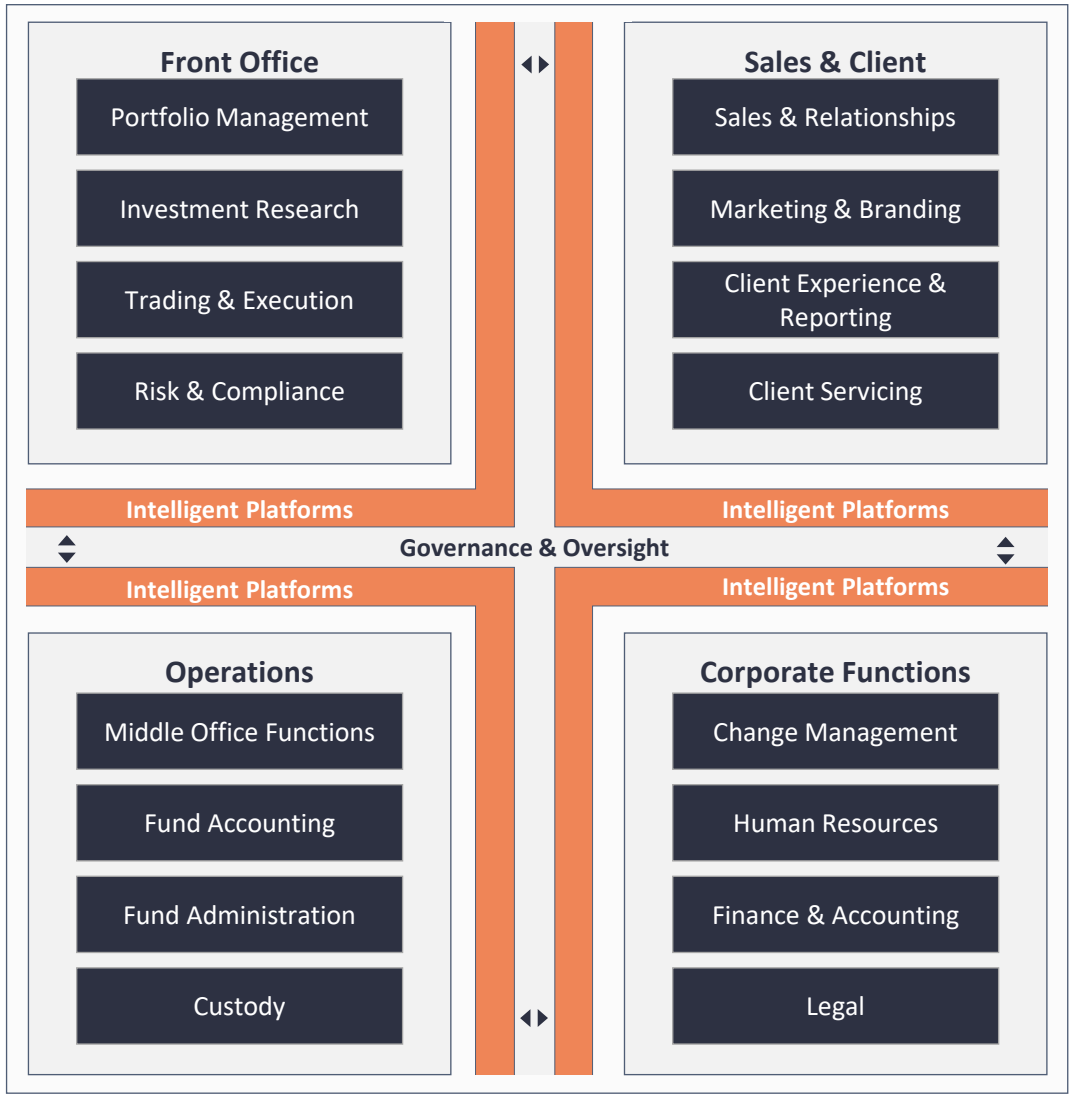
They analyze data, draft communications, monitor exceptions, coordinate work across systems and teams, and surface insights precisely when and where they matter. Humans contribute judgment, creativity, relationship depth, and accountability. Together, they form an interconnected system where capability flows to the point of highest value.

Teams are no longer defined by function but by mission. Work does not move through departments. It flows across an intelligent network. Decisions are no longer constrained by hierarchy. They occur at the speed of insight.

The result is an operating model that scales expertise without dilution, increases speed without sacrificing quality, and enables personalization without unsustainable headcount growth. Most importantly, it allows firms to deliver better client outcomes, faster innovation, and more resilient operations by working more intelligently, not harder.

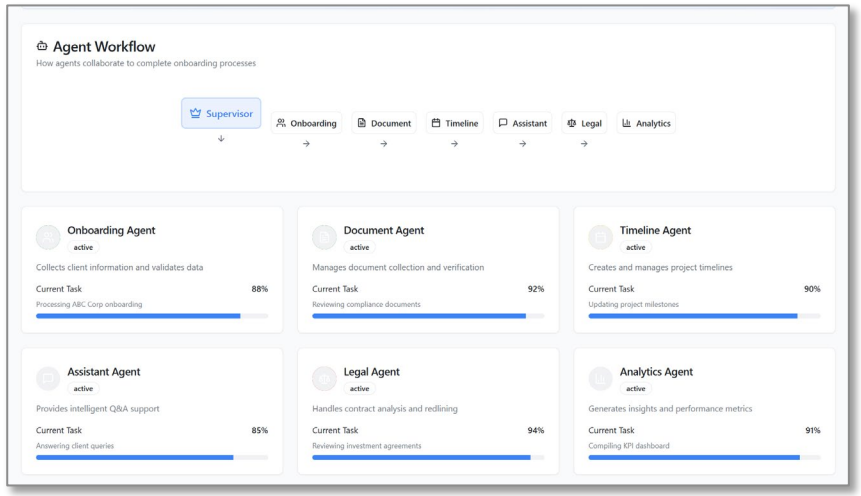
Future Agentic Operating Model

The future operating model will shift from linear processes to interconnected teams empowered by AI and intelligence, working seamlessly together to achieve business goals.



1.

Agentic Client Onboarding



Today

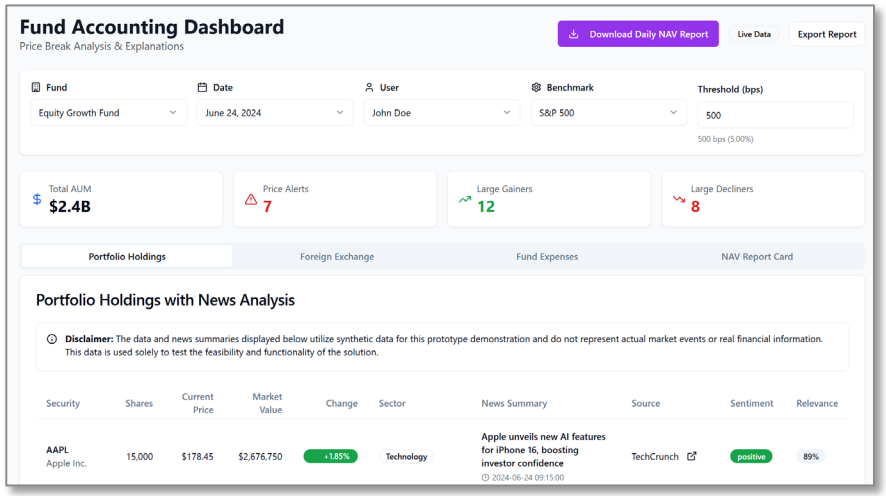
Agents supported siloed tasks across the onboarding process

Year 20AI

Intelligent platform orchestrating workflows and learning from past cases

2.

Intelligent Fund Accounting



Deep research agents used to explain exceptions and root cause analysis

Autonomous oversight from an intelligent platform trained on prior events